

Mayor's Office on Asian and Pacific Islander Affairs Budget Preparation Guidance

Introduction

Operations and/or program design and budget development and management are interdependent. One does not survive without the other. Agencies seek qualified and experienced people to design and manage their programs. The same qualifications need to be part of the operational and budget design.

In an attempt to help ease the application process OAPIA has created this guidance document along with a budget submission template for your use. There are key points to help standardize any application process including establishing a common price table for certain expenses such as travel, per-diem, consulting rates, personnel, and other non-personnel costs.

The budget justification or budget narrative provides the opportunity to explain the need/purpose of the line item and the method of calculation. Listing a line item, such as 4 Dell lap top computers, does not provide sufficient detail to the grantor of why the computer is needed, the impact on the proposed program and/or the specifications of the computer. Failure to provide sufficient detail often results in a less than favorable review and/or outright denial of budget items.

Reoccurring charges

Each business has annual recurring costs, and specifically, programs offered by an agency have recurring costs. Applicants should identify annual recurring costs and the impact on program sustainability.

Items to consider as reoccurring costs include non-personnel and personnel:

- Copier/Fax leases
- Copier/Fax maintenance
- PC maintenance
- Server maintenance
- Software licenses/maintenance
- Equipment maintenance
- Temp staff services
- Base facility/off site charges
- Program communication costs
- Personnel- (program assigned)

Each of the recurring costs requires justification – costs for the new grant year may include historical information. Example: *FY 06 Copier – Ikon multipurpose copier (printer, copier, scanner, fax, black and white and color). Program copying cost in FY05 was \$8,000. Agency used ABC vendor to copy program materials. Purchase of copier is expected to offer annual savings of \$2,000. Copier fees are \$180/mo with program portion x% per month.*

Travel

Airfare (usually not part of an OAPIA grant)

Below are some average figures for travel from Washington, DC to various destinations throughout the nation. In the event that your travel is to one of the cities not listed below, please use a good faith estimate on the potential cost.

Note: price listed below were listed by CDC 2006 – current airfare rates appear much higher due to gasoline costs

Washington, DC -Destinations

Atlanta	\$250
Boston	\$250
Chicago	\$200
Dallas	\$325
Detroit	\$225
Houston	\$275
Las Vegas	\$300
Los Angeles	\$350

Lodging/Per-Diem

The General Services Administration (www.gsa.gov) annually provides a lodging and per Diem schedule. The schedule includes: lodging at beginning and ending of a season (specific to the locale), mileage and expenses and a per diem (includes: food, local transportation and other miscellaneous trip-related expenses).

State	Destination	Location Defined (Counties unless otherwise defined)	Season Begin Date	Season End Date	FY06 Final Lodging Rate	FY06 M&IE
DC	District of Columbia	Washington DC (also the cities of Alexandria, Falls Church and Fairfax, and the counties of Arlington, Fairfax, and Loudoun in Virginia; and the counties of Montgomery and Prince George's in Maryland) (See also Maryland and Virginia)	October 1	December 31	\$166	\$64
DC	District of Columbia	Washington DC (also the cities of Alexandria, Falls Church and Fairfax, and the counties of Arlington, Fairfax, and Loudoun in Virginia; and the counties of Montgomery and Prince	January 1	May 31	\$187	\$64

		George's in Maryland) (See also Maryland and Virginia)				
DC	District of Columbia	Washington DC (also the cities of Alexandria, Falls Church and Fairfax, and the counties of Arlington, Fairfax, and Loudoun in Virginia; and the counties of Montgomery and Prince George's in Maryland) (See also Maryland and Virginia)	June 1	August 31	\$145	\$64
DC	District of Columbia	Washington DC (also the cities of Alexandria, Falls Church and Fairfax, and the counties of Arlington, Fairfax, and Loudoun in Virginia; and the counties of Montgomery and Prince George's in Maryland) (See also Maryland and Virginia)	September 1	September 30	\$166	\$64

Personnel Costs

Position	FTE	Hourly Rate	Annual Salary	Program Costs
Executive Director				
Director, Outreach				
Outreach Coordinator				
Outreach specialists				
Sub-total				
Fringe (x%)				
Total				

Fringe Benefits: *(Percentage is based on benefits offered by the company and paid to each employee, including but not limited to: paid days off, e.g. vacation, sick, holiday time, health, liability, long term care insurance, matching retirement accounts, etc.). Examples are: 18% for District employees to 35% for private firms.*

Note: grantees seeking to reallocate program personnel costs (salaries, wages and benefits) to non-personnel costs/services should notify the grantor to ensure continued support of the program goals.

Position Justification: *(Name of person or TBD, roles and responsibilities related specifically to the program, full or part time position)*

Executive Director
Director, Outreach
Outreach Coordinator
Outreach specialists

Non- Personnel Costs

Non Personnel	#/Amount	Unit Costs	Total Costs
Rent	700 sq ft	\$20 sq ft	\$8,400
Communications			
Printing, copying			
ID badges			
Supplies			
Security			
Marketing			
Contractors			
Facilitator			
IT Consultant			
Total			

Non- Personnel Costs – Budget Justification Narrative

Rent - current lease costs per sq.ft. amount of space needed by program and the amount of use. For example, agency has 2100 sq. ft and pays an inclusive \$20 sq. ft to rent space.

The program requires a total of 700 sq feet (including office space for program staff) and operates M-F. The prorated rent would be \$700/mo x 12 = \$8,400 per year.

Communications - website maintenance costs; total annual cost; % allocated to program.

Printing and Copying

- Brochures
- Educational materials
- Instructions
- Other

ID Badges

- Attendees
- Staff

Supplies

Security

Marketing

Contractors

Stipends

- Clients

- Interns

- Focus Groups